

ASSESSOR Bill Postmus

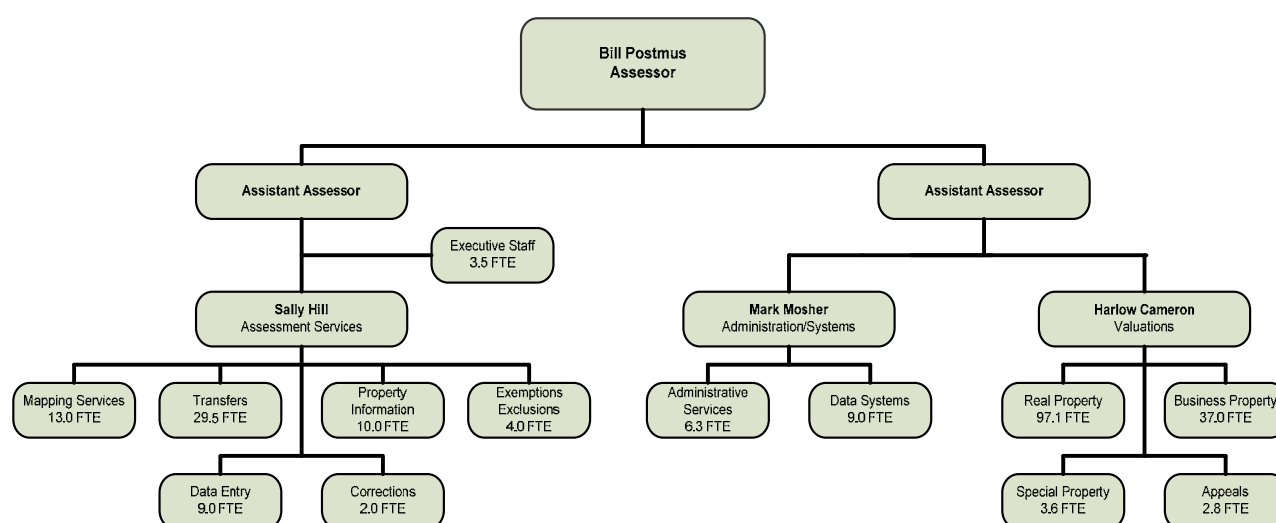
I. MISSION STATEMENT

The mission of the Office of the Assessor is to perform the state mandated function to:

- Locate, describe, and identify ownership of all property within the county
- Establish a taxable value for all property subject to taxation
- List all taxable value on the assessment roll
- Apply all legal exemptions

Assessor business is performed for the public benefit in a manner that is fair, informative and with uniform treatment. It is necessary as a means of revenue generation in order to fund essential public services and efficiently operate county and state government.

II. ORGANIZATIONAL CHART



III. DESCRIPTION OF MAJOR SERVICES

Under California law, the Assessor establishes a value for all property including residential, commercial, business and personal. The Assessor maintains current records on approximately 720,000 parcels of real property, 45,000 business property accounts and 35,000 other assessments including boats, aircraft, and manufactured home accessories. The Assessor also administers 17 different types of property tax exemptions including homeowners, veteran, disabled veteran, church, religious, and welfare exemptions.



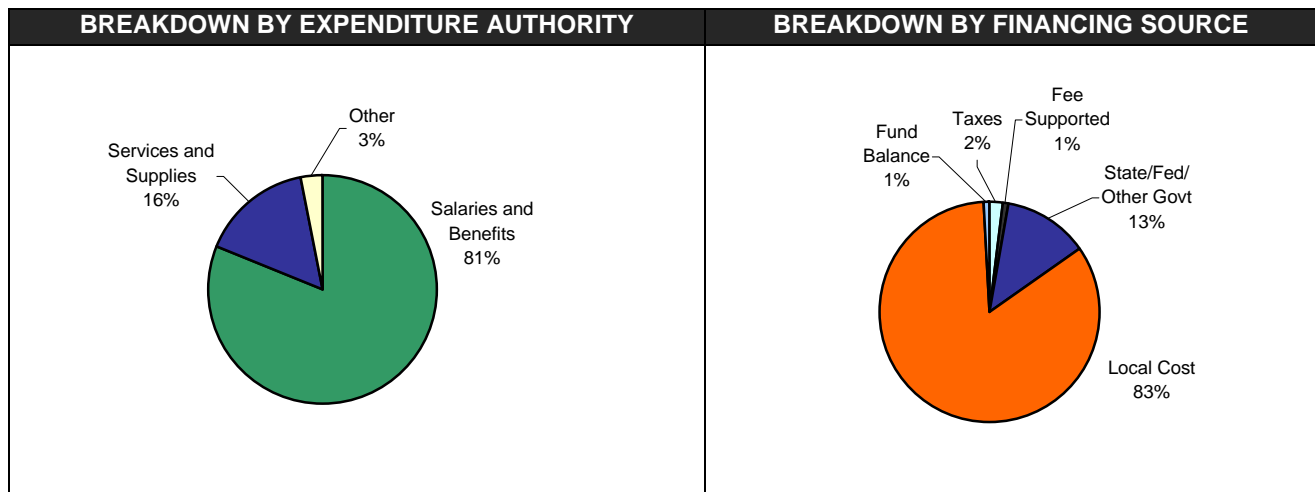
IV. 2005-06 ACCOMPLISHMENTS

- Added "Other Exemptions" forms to Assessor website.
- Created informational brochures in Spanish for website.
- Successful implementation (including training of employees on the new system) of Assessor Workflow System streamlining handling of recorded documents and providing online review.
- Upgraded departmental information technology to provide more stable environment and reduce maintenance costs.
- Implemented first phase of comparable sales program to assist in residential property valuation.
- Purchased and implemented property drawing tool to automate the manual process of drawing building records.
- Utilized statewide program for receipt of business property information.
- Purchased large scale printers to allow in-house printing of maps and other large documents to reduce long term operational costs.
- Automated receipt of manufactured housing data in order to reduce processing and incorporation into PIMS.
- Eliminated manual drawing of maps and converted to county GIS for maintenance of parcel maps.

V. 2006-07 SUMMARY OF BUDGET UNITS

	2006-07				
	Appropriation	Revenue	Local Cost	Fund Balance	Staffing
Assessor	17,559,215	820,000	16,739,215		204.5
State/County Property Tax Administration Program	2,410,943	2,255,295		155,648	28.3
TOTAL	19,970,158	3,075,295	16,739,215	155,648	232.8

VI. 2006-07 BUDGET



VII. GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

GOAL 1: PUBLISH THE ANNUAL ASSESSMENT ROLL TIMELY AND ACCURATELY BY ASSURING QUALITY CONTROL AND STANDARDIZATION.

Objective A: Identify and properly value all taxable property.

Objective B: Perform periodic and rotating accuracy checks on the processing of changes of ownership.

Objective C: Perform non-mandatory audits to assure businesses are reporting accurately and as required by law.

MEASUREMENT	2005-06 (Actual)	2006-07 (Projected)	2006-07 (Estimated)	2007-08 (Projected)
1A. State Board of Equalization quality control rating.	NEW	NEW	>95% accuracy	>95% accuracy
1B. Review a sample of 500 change of ownership events annually for accuracy.	N/A	95% accuracy	95% accuracy	95% accuracy
1C. Percentage increase of non-mandatory audits performed annually (34 audits in 2005-06).	N/A	10%	10%	15%

Status

Government Code Sections 15640 and 15642 define that the Board of Equalization shall perform assessment practice surveys for each California county and define the scope of the surveys. Revenue and Taxation code section 75.60 indicates that minimum assessment levels are needed for the county to be eligible to recover costs associated with administering supplemental assessments and that the county must obtain at least 95% of the assessment level as determined by the Board's most recent survey. Surveys are conducted every 4 years and the next one is scheduled for 2008.

With the acquisition of a new Title Transfer Technician II position, random surveys of change of ownership events will be performed and the results evaluated for accuracy.

Non-mandatory audits help assure compliance with personal property reporting guidelines and are recommended by the State Board of Equalization Assessment Practices surveys. 34 of these audits were completed in 2005-06. It is anticipated that 37 will be completed in 2006-07 and 39 will be completed in 2007-08.

GOAL 2: MAKE PROPERTY VALUATION INFORMATION MORE ACCESSIBLE AND EASIER TO UNDERSTAND.

Objective A: Enhance the Assessor's Internet website.

Objective B: Increase the amount of Spanish materials available.

Objective C: Improve the Assessor's phone system.

MEASUREMENT	2005-06 (Actual)	2006-07 (Projected)	2006-07 (Estimated)	2007-08 (Projected)
2A. Percentage of "yes" responses in satisfaction survey.	N/A	70%	70%	80%
2B. Number of Spanish materials available (343 forms and 50 web pages to be translated as of 2006-07).	N/A	2	2	4
2C. Percentage decrease of callers who receive a busy signal (400 callers or less 2006-07).	N/A	5%	5%	10%



Status

Visitors to the Assessor's website are asked "did you find the information you were looking for? Yes or No." And, "if not, what information were you looking for?" Based on responses to the survey, future improvements will be made to the website.

The number of Spanish-speaking property owners has increased in recent years. To assist these taxpayers in understanding the assessment process, forms and instructional material must be translated into Spanish. Failure to translate materials will require staff to verbally explain each program or leave taxpayers with an incomplete understanding of these assessment issues. In 2006-07, two instructional materials have been translated to date. They are "Appeals" and "Assessor Responsibility." There are 343 forms and 50 web pages yet to be translated. It is anticipated that 2 additional forms will be translated during 2007-08. If Policy Item #4 in Section IX is approved, thus adding a dedicated position to this translation project, it is anticipated that 24 forms and/or web pages will be translated in 2007-08. Translations will be ongoing throughout the year and continuing annually.

Past surveys of wait times for callers to the Assessor's Office property information lines revealed that callers must sometimes wait unacceptable periods of time to speak to a staff member. The current ACD (Automated Call Distribution) phone system in use assists callers by routing them to appropriate staff member. Adequate staff must then be available to assist callers. To decrease the amount of time callers must wait, two additional office assistant positions were added in 2006-07. Further, the acquisition of an enhanced phone monitoring system, as requested for 2007-08, will provide the data needed to make assessments for future improvements. Additional improvement is expected with the new Assessor's Internet website, an alternate source of information, in 2006-07 and into 2007-08.

GOAL 3: ENHANCE OPERATIONAL EFFICIENCY AND PRODUCTIVITY BY IMPLEMENTING NEW TECHNOLOGY, POLICIES AND PROCEDURES.

Objective A: Perform system reengineering

Objective B: Maintain current systems

MEASUREMENT	2005-06 (Actual)	2006-07 (Projected)	2006-07 (Estimated)	2007-08 (Projected)
3A. Number of system reengineering tasks completed (3 tasks 2006-07).	NEW	NEW	3	6
3B. Percentage of functionality/availability of systems – defined as available user time per employee (2088 hours 2006-07).	NEW	NEW	NEW	>95%

Status

System reengineering is the review for efficiency and the opportunity for improvement of current automated and manual processes such as converting building record images to electronic format. The Assessor's goal is to **complete 3** tasks with the addition of 1.0 Business System Analyst III position added in 2006-07. As workload constantly increases, processes are reviewed to eliminate inefficiencies.

The Assessor's Property Information Management System, Transfers Workflow, AES, APEX and GIS systems are in constant use and are updated by Assessor's staff. If these automated systems are unavailable, roll processing and public assistance cannot occur. System hardware must be maintained and upgraded to assure that Assessor's systems are available no less than 95% of the time. The current up time for systems is 95%, the Assessor's office strives to have greater than 95% functionality/availability of systems. As computer hardware ages it must be replaced to maintain productivity. A typical replacement schedule is every 3–5 years.



VIII. 2006-07 APPROVED ADDITIONAL GENERAL FUND FINANCING (POLICY ITEMS)

Policy Item 1:	The department received \$115,000 in one-time general fund financing for computer server hardware and software for a more efficient Microsoft supported system.
Policy Item 2:	The department received \$257,757 in ongoing general fund financing for 3.0 positions in the public service staff and Systems division staff to increase public service and assist in monitoring Assessor assets; 2.0 positions in Administrative and Services staff to increase public service and assist in map maintenance; and the reclassification of an Office Assistant II to an Office Assistant III to increase public services.
Policy Item 3:	The department received \$1,045,950 in ongoing general fund financing for 15.0 positions in Real Property staff and Valuations staff to minimize workload backlogs and delays in valuation.
Policy Item 4:	The department received \$162,315 in ongoing general fund financing for 4.0 positions in Assessment Services staffing to increase transfers quality.
Policy Item 5:	The department received \$8,800 in ongoing general fund financing for reclassification of critical staff for drawing any new building plans and redrawing the existing records.
Policy Item 6:	The department received \$104,378 in ongoing general fund financing for 1.0 position in the Systems Division staff to assist in reengineering Assessor processes.
Policy Item 7:	The department received \$154,500 in ongoing general fund financing for 2.0 positions in the Executive staff to increase public outreach service.
Policy Item 8:	The department received \$79,000 in ongoing general fund financing for 1.0 position in the administrative staff for coordinating construction projects, remodels and maintenance with Architecture and Engineering, Facilities Maintenance and private designers, consultants and other agencies.

MEASUREMENT	2005-06 (Actual)	2006-07 (Projected)	2006-07 (Estimated)	2007-08 (Projected)
P1. Replace computer server hardware.	N/A	>95%	100%	N/A
P2. Percentage decrease in taxpayer wait time.	N/A	5%	5%	6%
P3. Percentage decrease of backlog of appraisal units (6084 backlog appraisals 2006-07).	N/A	10%	10%	15%
P4. Maintain transfers accuracy rate of 95% or greater (200,000 documents 2006-07).	N/A	95%	0%	96%
P5. Maintain mapping accuracy rate of 95% or greater (3,500 parcels 2006-07).	N/A	95%	0%	96%
P6. Number of system reengineering tasks completed (3 tasks 2006-07)	N/A	3	3	9
P7. Percentage increased public outreach.	N/A	10%	0%	70%
P8. Percentage of adverse work environment conditions reviewed	N/A	50%	0%	100%

Status

The process of replacing computer systems hardware and software has begun. Complete replacement is anticipated by March 2007.

Of the positions approved for Policy Item 2 only 1.0 position has been filled as of December 2006, therefore, no positive impact on taxpayer wait times has been measured. Once the remaining positions have been filled and after the typical 6 month training period, it is anticipated that wait times will begin to decrease. For 2007-08 this decrease will be small as the new hires will be in training for approximately half of the year.



A small number of the 15.0 new positions in Valuations have been filled. As positions continue to be filled appraisal unit backlog will begin to decrease and with time will be eliminated. Progress will be slow at first as new hires are trained and brought up to speed, typically 6 months for technicians and clerical staff and up to 1 year for appraisers.

The department anticipates 4.0 new positions in Assessment Services will not be filled before March 2007, therefore, no benefit has been realized in transfers until early 2007-08.

The reclassification in Policy Item 5 has not been processed by Human Resources yet. The positions will likely not be classified or filled before March 2007, therefore, no benefit has been realized until early in 2007-08.

The position in Policy Item 6 has not been hired; the position will likely not be filled before March 2007, therefore, no benefit has been realized until early in 2007-08.

The positions in Policy Item 7 have not been hired; the positions will likely not be filled before March 2007, therefore, no benefit has been realized until early in 2007-08.

The position in Policy Item 8 has not been hired; the position will likely not be filled before March 2007, therefore, no benefit has been realized until early in 2007-08. Once this dedicated position is filled all adverse work environment conditions can be reviewed. Currently adverse conditions are reviewed as they are identified by staff.

IX. 2007-08 REQUESTS FOR ADDITIONAL GENERAL FUND FINANCING (POLICY ITEMS)

2007-08 OBJECTIVES FOR POLICY ITEMS	2007-08 POLICY ITEMS
1. Continue to improve the Assessor's phone system	Install phone monitoring system. Additional Funding Requested: \$50,000, one-time money
2. Process change of ownership documents, determine appropriate value of subject property and apply all legal exemptions.	Procure remote appraisal devices which are handheld computer devices into which property characteristics can be recorded and stored. Additional Funding Requested: \$350,000, one-time money
Utilize technology and develop additional tools to increase staff production and provide user-friendly public access.	A. Procure temporary contract services and necessary equipment (i.e. computers, etc.) to covert building record images to electronic format. Funding is estimated at \$600,000 one-time cost. B. Add 1.0 Programmer Analyst III to the ISD PIMS team. C. Add 1.0 Programmer Analyst III to develop Assessor GIS applications. Additional Funding Requested: contract services: \$600,000; new positions: \$209,000 (96,000 salary & benefits + 6,500 work station + 2,000 computer equipment each position), ongoing cost. Total request: \$600,000 one-time money and \$209,000 ongoing cost.



2007-08 OBJECTIVES FOR POLICY ITEMS	2007-08 POLICY ITEMS
4. Enhance the Assessor's Internet website and increase the amount of Spanish materials available	<p>Add 1.0 Business Systems Analyst I to develop and maintain Spanish forms and other Spanish materials (i.e. web pages, etc.). This position will also assist in system analysis for the maintenance of PIMS.</p> <p>Additional Funding Requested: \$89,000 (80,500 salary & benefits + 6,500 work station + 2,000 computer equipment); ongoing cost.</p>

MEASUREMENT	2005-06 (Actual)	2006-07 (Projected)	2006-07 (Estimated)	2007-08 (Projected)
P1. Percentage decrease of callers who receive a busy signal (400 callers or less 2006-07).	NEW	NEW	NEW	15%
P2. Percentage decrease of lag time to capture property characteristics and enter them into the PIMS database (8 hours 2006-07).	NEW	NEW	NEW	50%
P3A. Percentage of building record images converted to electronic format (500,000 images 2006-07).	NEW	NEW	NEW	25%
P3B. Percentage increase of system task list items completed (400 task list 2006-07).	NEW	NEW	NEW	5%
P3C. Number of GIS applications developed.	NEW	NEW	NEW	3
P4. Number of Spanish materials created (343 forms and 50 web pages to be translated as of 2006-07).	NEW	NEW	NEW	24

X. 2007-08 PROPOSED FEE ADJUSTMENTS

The department is not requesting any proposed fee adjustments for 2007-08.

If there are questions about this business plan, please contact Mark Mosher, Administration Manager/Departmental Information Manager, at (909) 387-6584.

NOTE: The present Assessor was elected on November 7, 2006 and sworn into office on January 8, 2007. Due to the timing of this publication, there maybe modifications to this business plan presented at the Business Plan Workshop.

